



F. Source of Investment Certificate

Approved Retirement Fund (ARF)

This certificate is required in accordance with Section 784B of the Taxes Consolidation Act 1997

Section 1 Approved Retirement Fund (ARF) investment

Customer's details

Name	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Proposed amount to invest	€ <input type="text"/>
Proposal Number	<input type="text"/>
Name of existing insurance company or qualifying fund manager or other source	<input type="text"/> <input type="text"/>

To be filled in by the insurance company, qualifying fund manager, PRSA provider. Give details of the assets being used for this investment. Trustee of occupational pension schemes also fill this form in.

Section 2 Source of Investment

Is the proposed investment amount being provided from an existing Approved Retirement Fund or Vested PRSA?

Yes ☐ No ☐

If the answer is 'Yes' please confirm the gross value of all income drawdowns taken in the current tax year from the transferring ARF or Vested PRSA. If no income drawdown has been taken in the current tax year please confirm the amount as 'Nil'.

€

If the answer is 'No', please describe where the investment is coming from, for example, a Retirement Annuity Contract, PRSA, Company Pension Plan, AVC Plan, Personal Retirement Bond (buy-out bond) or self-administered pension scheme.

If the proposed investment is coming from a Company Pension plan, please confirm the name of the Company Pension Scheme the investment is being transferred from.

Is this transfer as a result of a property adjustment order?

Yes ☐ No ☐

If Yes, please provide a copy of the property adjustment order.

We confirm that:

- the proposed investment amount to which this certificate relates comprises of assets to which the individual named above is beneficially entitled; and
- the assets to which this certificate relates do not form part of an Approved Minimum Retirement Fund (AMRF) within the meaning of Section 784C of the Taxes Consolidation Act 1997; and
- the assets to which this certificate relates derive from an approved source within the meaning of Section 784B of the Taxes Consolidation Act 1997.

Block Capitals

Name



Signature

Please sign and date

Date (dd/mm/yyyy)

/ /

Position

Insurance Company/QFM/Other